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Splitting the Proceeds of a 1035 Exchange Unlocks Planning Opportunities

We’ve seen strategies for utilizing accumulation-focused insurance policies that have grown significant cash value become an effective repositioning strategy. The result is an updated insurance position that reflects the client’s current needs and leverages today’s modern products, all without creating a taxable event.

Interested in learning more? Let’s chat!

#lifeinsurance #1035exchange #lifeinsurancerepositioning #retirementplanning